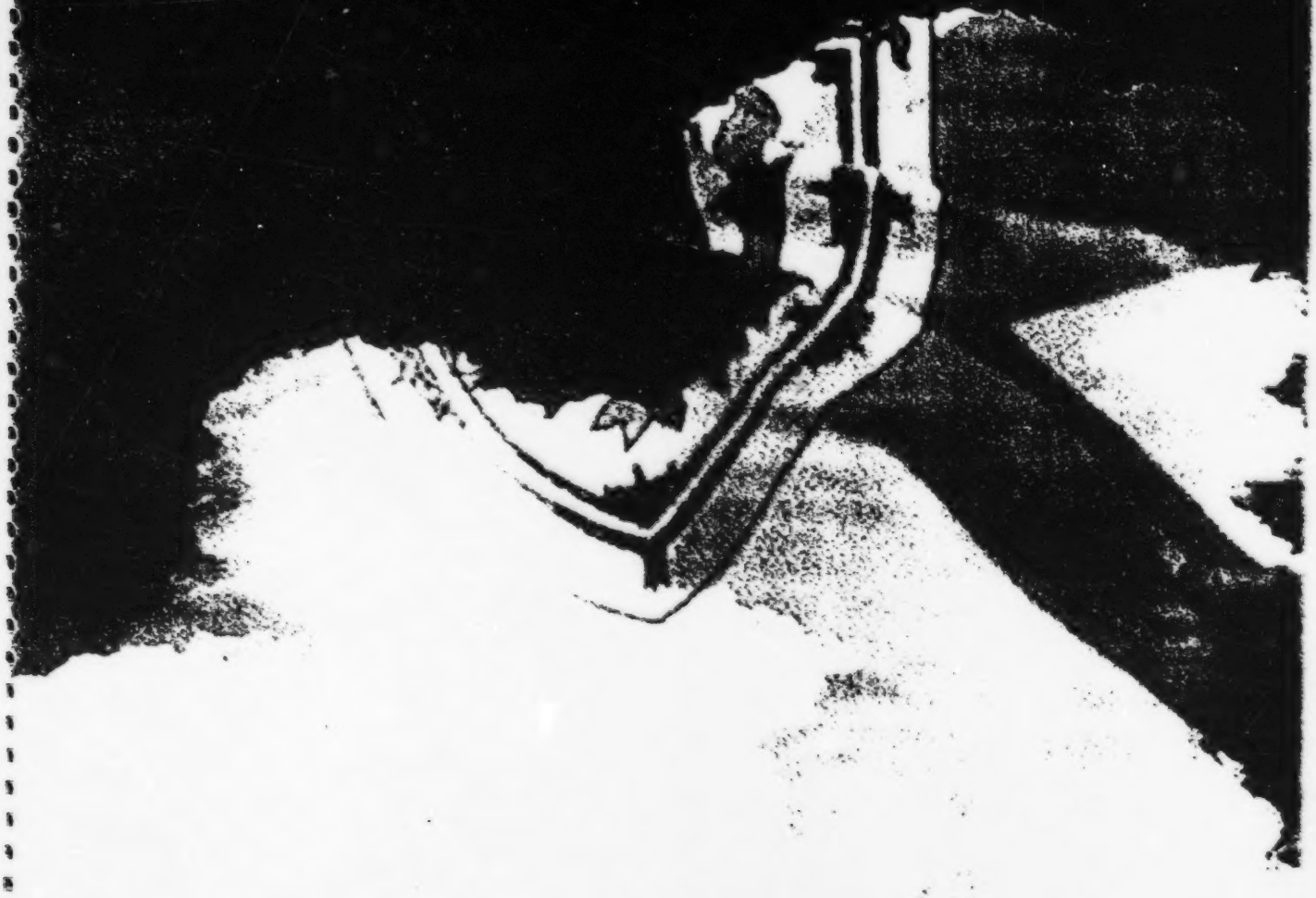
NOVA SCOTIA



NOVA SCOTIA
Tourism Partnership
COUNCIL

Annual Report
June 1999

An Introduction

June, 1999

Dear Tourism Partner:

Nova Scotia's Tourism Partnership Council is celebrating its first year of operation. Announced by the Minister of Economic Development and Tourism in May, 1998, the council has enjoyed remarkable success and enormous commitment from both the private and public sector. By all accounts, it's working!

With tremendous dedication, the council and its committees have held more than 75 meetings during our initial year of operation, with the full council membership meeting 11 times during the year. Together, we achieved a great deal, including articulating our role, mandate, vision and objectives; developing operating guidelines; hosting industry input sessions; conducting surveys and making presentations to industry; securing more resources and launching marketing plans and programs.

This report captures our activities during the past year. It's part of our efforts to be accountable to the many stakeholders we serve — from tourism operators, financial partners and associations throughout the province to the Government of Nova Scotia.

We've highlighted our achievements, including the development of our first marketing plan. We presented that plan in November and industry reacted very positively. While the 1999 marketing plan was the first priority of the council, our partnership is more than just marketing. Since November, we've been looking at a process to address other aspects of our mandate, and we've documented those activities along with our objectives for next year.

We've also included highlights of the industry's impressive performance in 1998. Tens of thousands of Nova Scotian jobs depend on this $1.1 billion tourism activity. The outlook for this year is also positive, and we're well poised to capitalize on the growing travel market.

As was intended, our partners are contributing where they best can. Industry contribution has been significant and includes a huge time commitment to the process, meeting room space and other in-kind contributions, and increased financial support for marketing programs.

Government is supporting our activities through a budget for the tourism marketing and product development programs, as well as funding for administrative support. Staff with both the Nova Scotia Marketing Agency and Tourism Nova Scotia have provided invaluable support to our effort, and we thank them for their commitment.

An Introduction (con't)

Together our efforts are paying big dividends with 1998 the best year ever — best in terms of revenue and best in terms of the working relationship between industry and government.

We trust you'll find this report informative. Our hope is that you gain a better understanding of the task we're undertaking. We also hope you'll join us as we work to address issues of vital importance to the growth of our tourism industry, including increasing resources and investment and further defining the council's role for the future.

Sincerely,

Doug

Doug Fawthrop, Chair
Tourism Partnership Council

Table of Contents

Introduction

Council Overview
- Background 4
- Mission 5
- Vision 5
- Mandate 6
- Structure 6
- Budget/Administrative Support 7
- Membership 7

Committee Reports
- Executive 9
- Communications 12
- Marketing 14
- Product Development 18
- Vision 21

Appendices
- 1998 Tourism Industry Performance Highlights 23
- Nova Scotia Marketing Agency and Tourism Nova Scotia Staff 25

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—— Council Overview ——

Background

Three years ago, industry and government developed a joint *Tourism Strategy for Nova Scotia*. That strategy identified four major areas for immediate attention: developing and marketing our product strengths; improving quality; enhancing transportation access; and addressing seasonality.

The strategy also called for a true partnership between industry and government, in everything from research and development to marketing and support. The industry has always worked with government. However, often there was a feeling that industry was not an equal partner. Industry therefore challenged government to formalize a joint approach to managing tourism.

The Minister of Economic Development and Tourism agreed to form a joint committee comprised of senior officials of the department and industry to review potential options for a new partnership arrangement. The committee began meeting in January, 1997 to review structures in other provinces and to gather information and opinions here at home. Across the board, there was a commitment to work together, to commit resources and to invest time in making this new council work.

A partnership model was taken to industry and government in 11 regional meetings for broader consultation and input in September/October 1997. The new Nova Scotia Tourism Partnership Council structure was announced formally in November 1997 at the Nova Scotia Tourism Conference. It called for 14 industry leaders and two representatives from government, with seven industry members selected at large and another seven selected on a geographic basis to ensure balanced representation.

The first council membership was announced by the Minister of Economic Development and Tourism in May, 1998. Members have been appointed for a two-year term and were selected by an industry-led selection committee.

—— Council Overview ——

Mission

The mission of the Tourism Partnership Council is to work cooperatively to bring more visitors into Nova Scotia and increase the amount of money those visitors spend.

Vision

The council's vision and principles focus on where the industry is headed and how the council will work in partnership to get there. They also serve as the framework for prioritizing what marketing and product development plans to pursue. To draft its vision, the council used the *Tourism Strategy for Nova Scotia* developed in 1996. The council also incorporated aspects of the Canadian Tourism Commission's vision for the tourism industry in Canada.

The council's vision is to:

Realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians.

This shared vision is guided by the following principles:

- **enhance the quality of life and the economic circumstances of all Nova Scotians, by building tourism as a leading growth industry.**
- **protect the environment, our way of life and our cultural diversity.**
- **support the sustainability of tourism.**
- **encourage a hospitality culture in all Nova Scotians.**
- **facilitate a business environment which encourages tourism entrepreneurship and the creation of world-class products.**
- **build the quality and standards of our tourism products to a world-class level.**

In addition to serving as the council's aspiration, it's hoped that other industry stakeholders will support the overall vision when defining their own long-term direction.

—— Council Overview ——

Mandate

The council's mandate is to direct the planning and delivery of provincial tourism marketing and product development programs. In doing so, the partnership enables industry and government to share decisions, responsibilities and resources. The new partnership means:

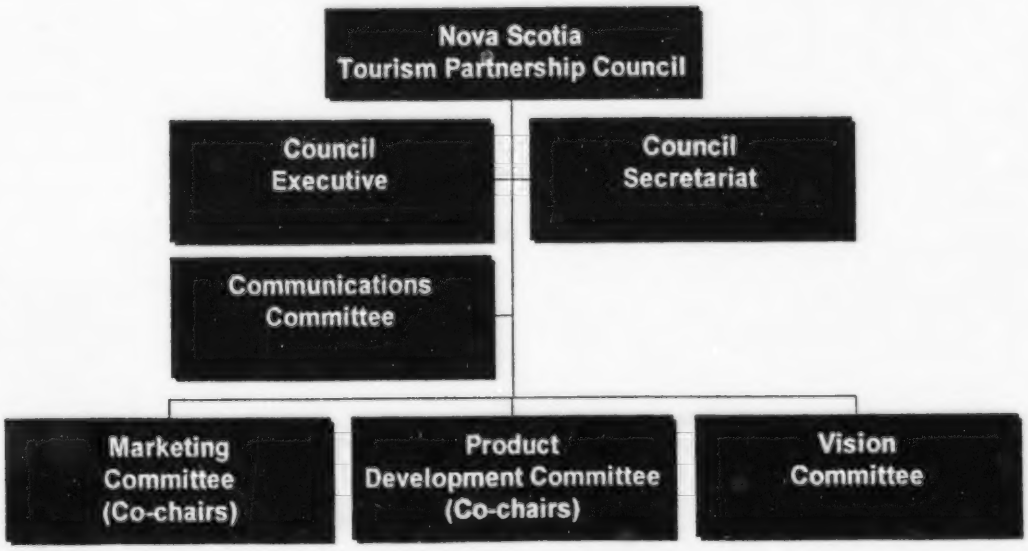
- true industry participation in the decision-making process; and
- a better integration of programs to reflect industry priorities.

Structure

The structure reflects the council's role in marketing, product development and long-term vision. Communications is a primary function of all three. Overall, committees are responsible for:

- recommending programs and initiatives to support council goals
- organizing sub-committees and/or task forces using objectives as a focus, and
- ensuring the process is inclusive by continuously soliciting stakeholder input.

Committee chairs are council members, who add other members to develop plans and meet objectives. The council continually networks with and receives input from existing organizations and their committees.



—— Council Overview ——

Budget/Administrative Support

Funding for the council's activities is supplied through provincial sources already dedicated to tourism as well as by private sector contributions through investment in marketing partnerships. The council is staffed with existing employees at Economic Development and Tourism. One person performs secretariat functions, and one person is responsible for communications, with additional support for council committees provided by the staff of Tourism Nova Scotia and the Nova Scotia Marketing Agency.

Membership

The 16-member council was appointed by the Minister of Economic Development and Tourism based on recommendations from an industry-led selection committee. It includes 14 tourism industry owners or operators and two representatives from government. Seven industry members were selected at large and another seven were selected on a geographic basis to ensure balanced representation. All have been appointed for a two-year term, beginning in May 1998.

Members include:

- **Doug Fawthrop**, managing director, White Point Beach Resort, Liverpool; past president, South Shore Tourism Association; chair, Canada Select Nova Scotia; member, Air Accord Working Committee; director, CAA Maritimes. **Doug is chair of the council**.

- **Paul Stackhouse**, general manager, Holiday Inn Harbourview, Dartmouth; chair, Tourism Strategy Implementation Team; president, Hotel Association of Nova Scotia; vice president, TIANS. **Paul is vice chair council**.

- **Peggy Anderson**, owner of Kidston Landing, Baddeck; past board member, Canadian Tourism Commission; past president, Tourism Industry Association of Nova Scotia (TIANS).

- **Susan Bartlett**, owner of Inn on The Lake, Waverley; past president of TIANS; regional private sector representative for Nova Scotia/Newfoundland on the Canadian Tourism Commission (CTC); board of directors and co-chair, industry representation for Nova Scotia for the Atlantic Canada Tourism Partnership (ACTP).

- **Victor Ferreira**, regional vice president of CP Hotels and general manager, Hotel Halifax; member of the Hotel Association of Nova Scotia and the Greater Halifax Conventions and Meetings Bureau.

—— Council Overview ——

Membership (con't)

- **Bill Hay**, owner, Mastodon Ridge and Showcase Nova Scotia, Stewiacke; president, Central Nova Tourist Association, and board member of TIANS.

- **Lloyd Hines**, owner, Belmont Resort and Golf Course, Guysborough; warden, Municipality of the District of Guysborough; chair of Sable Community Advisory Committee; vice chair Antigonish Eastern Shore Tourism Association.

- **Lou Leith**, branch manager, Budget Car and Truck Rental, Sydney; executive committee member and chair of the Membership Council, Tourism Cape Breton.

- **Michele McKenzie**, executive director, Nova Scotia Marketing Agency, Economic Development and Tourism.

- **Ella McQuinn**, principal, McQuinn & Company Marketing.

- **David Miller**, owner, McDonald's Restaurants in Antigonish and Port Hawkesbury; member, Planning Advisory Committee for the Town of Antigonish and Tourism Sector of Voluntary Planning.

- **Eric Mullen**, managing director, Canadvac Travel Services Ltd.; president of TIANS; private sector representative on the Atlantic Canada Tourism Partnership, Tourism Programs Committee; member, Air Accord Working Committee.

- **David Oxner**, executive director, Tourism Nova Scotia, Economic Development and Tourism.

- **Brian Rodney**, owner, Best Western Mermaid Motel, Capri Motel of Yarmouth and Captain Kelley's Restaurant, Lounge & Pub; chair, Transportation Committee of the Yarmouth County Tourist Association (YCTA); past president of YCTA.

- **Raymond Tudor**, owner, Brier Island Lodge and Restaurant, Westport, Brier Island; member, YCTA, Evangeline Trail Tourist Association and TIANS.

- **Karl Webb**, co-owner, Havenside Bed and Breakfast, Hackett's Cove; senior vice-president, TIANS and chair of the TIANS Policy Committee; member, South Shore Tourist Association and Nova Scotia Bed and Breakfast Association.

—— Committee Reports ——

Executive Committee

Mandate

This committee helps manage the work load and keeps the council on track. The group organizes reporting information, brings recommendations forward and oversees internal and external communications. The executive committee is made up of members appointed by the council, with the chair of the council at the helm. Executive directors of both the Nova Scotia Marketing Agency and Tourism Nova Scotia are also standing members.

Members

- Chair, Doug Fawthrop, White Point Beach Resort
- Vice-chair, Paul Stackhouse, Holiday Inn Harbourview
- Bill Hay, Mastodon Ridge
- Karl Webb, Havenside Bed and Breakfast
- Michele McKenzie, Nova Scotia Marketing Agency
- David Oxner, Tourism Nova Scotia
- Angela Poirier, Ex-officio, Communications
- Peggy Tibbo-Cameron, Ex-officio, Secretariat

Meetings

The Executive has met 25 times throughout the year with many meetings lasting several hours.

Achievements

- Addressed all issues of the council that were initiated both within the council's committees and those that were forwarded from outside the council.

- Developed *Operating Guidelines for the Council*, including operating goals, powers and duties, composition, voting methods, relationships to stakeholders and financial responsibility.

- Mediated the issue of rating systems used in the Nova Scotia Doers and Dreamers Guide, with tourism industry associations giving unanimous support that Canada Select remain the official provincial rating system for accommodations.

Executive Committee Report (con't)

- Facilitated discussions regarding proposed Tourism Accommodations Act definition changes that specifically create a new category of accommodations "Bed & Breakfast Inns". A sub-committee was formed by the Tourism Partnership Council in response to a request by tourism industry operators to provide an opinion to Tourism Nova Scotia.

- Developed a policy to increase the timely reporting of accommodation occupancy statistics. The policy includes penalties for operators who fail to submit statistics in a timely manner.

- Initiated the preparation of a business case — a concise, strategic report that documents the power of tourism as an economic growth engine in Nova Scotia and defines the resources required to respond to tourism marketing challenges.

- Improved relationships with industry associations as well as the Atlantic Canada Tourism Partnership and the Canadian Tourism Commission through participation in meetings, seeking input and initiating on going communications activities. Instituted a support program to ensure Nova Scotia participation on key CTC committees.

- Cat Promotion — the largest Canadian tourism industry promotion in the United States for 1999. Partners in the promotion were Nova Scotia and Bay Ferries, the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership, Enterprise Cape Breton Corporation, Nova Scotia's Celebration of Music program and Prince Edward Island

Concerns/Challenges

- Developing and supporting the next phase of the Tourism Partnership Council.

- Financing for infrastructure.

- Further developing and enhancing of tourism products.

- Identifying policy issues and developing positions on such issues.

- Increasing participation in the council.

- Ensuring all committees are active.

Objectives

- Seek more input and host more industry consultations.
- Complete product development and communications plans.
- Promote inclusion and increase membership in all committees.
- Implement product development and marketing plans and programs.
- Encourage and build stronger partnerships.
- Develop policies in areas such as:
  - improved competitiveness of the industry,
  - infrastructure development including financing options
  - quality/standards
  - business case

—— Committee Reports ——

Communications Committee

Mandate

To establish general principles, guidelines and plans around council communications. This includes providing overall direction for outgoing communications and industry promotion, as well as guiding and monitoring solicited incoming communications.

Members

- Chair, Peggy Anderson, Kidston Landing
- Marsha Andrews, Nova Scotia Marketing Agency
- Eric Mullen, Canadvac Travel Services Ltd.
- David Miller, McDonald's Restaurants
- David Oxner, Tourism Nova Scotia
- Raymond Tudor, Brier Island Lodge and Restaurant
- Angela Poirier, Ex-officio, Communications

Resource support to the council committees is provided by the staff of Tourism Nova Scotia and the Nova Scotia Marketing Agency.

Meetings

The Communications Committee has held three formal meetings with numerous telephone discussions and e-mail communications to deal with issues.

Achievements

- Developed a Communications Plan designed to keep stakeholders informed about provincial programs and services as well as increase awareness and understanding of the importance of tourism to the economy of Nova Scotia and the opportunities and challenges that exist for the industry.

- Developed a council web site (www.nstpc.com) to help operators gain more insight and information on council programs. The site also has on line conference ability, which enables industry to post messages and others to respond.

- Provided communications support for industry input sessions and the council's 1999 Marketing Plan Video.

Communications Committee Report (con't)

- Distributed *Council Updates* to industry associations for distribution to members as well as sought coverage in industry publications.
- Oversaw development of a comprehensive tourism stakeholder database.
- Conducted media relations, including issuing news releases and responding to inquiries

Concerns/Challenges

- Cooperating and coordinating among partners to improve communications.
- Developing strategic plans that support overall objectives, i.e. increasing awareness about the economic impact of tourism and the need for investment.
- Improving links between corporate and marketing communications.

Objectives

- Exceed the needs of stakeholders by keeping them informed about provincial programs and services of the council as well as sharing relevant information from other organizations such as the Canadian Tourism Commission and the Atlantic Canada Tourism Partnership.
- Increase awareness and understanding of the importance of tourism to the economy of Nova Scotia and the opportunities and challenges that exist for the industry.
- Highlight the role and importance of provincial programs that contribute to the success of tourism in Nova Scotia and to demonstrate how the Tourism Partnership Council complements existing organizations and is helping to build and enhance the tourism sector.
- Improve internal communications among staff and council so that information sharing and input is the norm.

—— Committee Reports ——

Marketing Committee

Mandate

The overall role of the committee includes delivering the tourism marketing components of the council's long term plan and preparing and evaluating an annual tourism marketing plan. It also coordinates related activities of the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership and the Air Accord Working Committee. It also specifies product development opportunities and initiatives that could have an impact on marketing programming. The Marketing Committee continually seeks input through scheduled workshops and formal surveys. It also networks with existing organizations on an ongoing basis and reviews both solicited and unsolicited proposals.

Members

- Co-chair Doug Fawthrop, White Point Beach Resort
- Co-chair Michele McKenzie, Nova Scotia Marketing Agency
- Bob Boyd, Tourism Nova Scotia
- Jon Denman, Denex Group Inc.
- Victor Ferreira, CP Hotels and Hotel Halifax
- D. A. Landry, Enterprise Cape Breton Corporation
- Ella McQuinn, McQuinn & Company Marketing
- Brian Rodney, Best Western Mermaid and Capri Motels and Captain Kelley's Restaurant
- John Somers, Nova Scotia Marketing Agency
- Hank Stackhouse, Delta Barrington Hotels
- Angela Poirier, Ex-officio, Communications
- Peggy Tibbo-Cameron, Ex-officio, Secretariat

Resource support to the council committees is provided by the staff of the Nova Scotia Marketing Agency and Tourism Nova Scotia.

Meetings

The Marketing Committee held 17 meetings throughout the past year while it developed the 1999 marketing plan and is now focusing on the broader marketing issues

Achievements

- Developed the 1999 Marketing Plan, taking into account extensive customer research, including results from focus groups and quantitative research in key markets, conversion studies to determine the effectiveness of ad campaigns and visitor exit surveys. Industry input was also provided through a series of workshops held across the province. A survey was also mailed out to more than 1,600 operators, one-on-one meetings were held with major partners and specific industry proposals were reviewed.

- Developed and distributed the Nova Scotia Partnership Opportunities booklet (Blue Book), which outlined a number of cooperative offers, including media advertising offers in key markets, financial support for destination marketing programs and travel show participation, advertising opportunities in publications such as the Doers and Dreamers Guide and support to develop Nova Scotia's most popular products.

- Successfully presented 1999 marketing plan at the Fall Tourism Conference, which included a video highlighting details about the provincial tourism marketing plan that is now underway to ensure that Nova Scotia capitalizes on the growing travel market. An updated version of the video was also distributed to stakeholders throughout the province.

- Established a sub-committee structure by incorporating the work of existing task forces and establishing new committees.

  Destination Marketing Committee: This committee manages the Destination Marketing Program. Members include:
  - Bill Hay, Mastodon Ridge
  - Lynne Perry, South Shore Tourism Association
  - Patricia Lynch, Nova Scotia Marketing Agency

  Air Access Committee: This committee manages the Air Accord Program. Members include:
  - Chair Hank Stackhouse, Delta Barrington Hotels
  - Sally Anderson, Halifax Regional Municipality
  - Greg Bent, Economic Development and Tourism
  - Doug Fawthrop, White Point Beach Resort
  - Fraser Howell, Yarmouth Airport Commission
  - David Jones, Nova Scotia Marketing Agency
  - Eric Mullen, Canadvac Travel Services
  - Jerry Staples, Transport Canada
  - Bill MacDonald, Atlantic Canada Opportunities Agency
  - Colin MacDonald, Clearwater Fine Foods Inc.

- Roger Mombourquette, Sydney Airport Authority
- David Oxner, Tourism Nova Scotia
- Gordon Stewart, Terelle Management Inc.
- Denis Rogers, Halifax International Airport Authority
- Lew Rogers, Halifax Regional Municipality
- Michele McKenzie, Nova Scotia Marketing Agency
- Rick Young, Nova Scotia Marketing Agency

Tour Wholesaler Task Force: The group advises on the Tour Wholesaler Partnership Program. Members include:

- Pauline Chenard, Tourism Hospitality Services
- Pat Lyall, Canadian Pacific Hotels/ Hotel Halifax
- Ella McQuinn, McQuinn & Co. Marketing
- Minto Stewart, Nova Scotia Marketing Agency

Marketing Plan Task Force: this task force is in place to develop the marketing plan for the year 2000. Members include:

- Lisa Bugden, Sheraton Casinos
- Doug Fawthrop, White Point Beach Resort
- Jim Laceby, Blomidon Inn
- Elizabeth MacDonald, Parks Canada
- Ella McQuinn, McQuinn & Co. Marketing
- Brian Rodney, Best Western Mermaid & Capri Motels and Captain Kelley's Restaurant
- John Somers, Nova Scotia Marketing Agency

What's New for 1999

- Increased investment in core markets:

  - Quebec: Production of Nova Scotia's first french language travel guide, and increased media weight.

  - New England: Cat Promotion — The largest Canadian tourism industry promotion in the United States for 1999 earned overwhelming results as more than 18,000 New Englanders visited the unique floating travel show aboard the Cat in Boston, May 14 to 16. Partners in the promotion were Nova Scotia and Bay Ferries, the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership, Enterprise Cape Breton Corporation, Nova Scotia's Celebration of Music program and Prince Edward Island.

Marketing Committee Report (con't)

- Focus on direct marketing, with increased emphasis on direct mail in key markets.

- In Province Promotion Program: A new program was launched to promote increased length of stay and increased expenditures by visitors to Nova Scotia. Key components are information kiosks located in strategic locations throughout the province (e.g. accommodations, attractions, retail outlets), and a festivals promotion program with McDonald's Restaurants throughout the province.

- Rendez-Vous Canada, Halifax, May 8-12, 1999: Sponsored by Atlantic Canada, this major international tourism trade show was hosted by a Nova Scotia based committee. The show resulted in $350 million in signed deals between Canadian operators and foreign and domestic buyers. The host committee was praised for an outstanding job.

Concerns/Challenges

A number of these challenges will overlap with and affect the activities of the 2000 Task Force:

- Co-ordinating work between the marketing committee and the sub-committees.

- Integrating product development and marketing planning / activity streams.

- Addressing such issues as:
  - Seasonality
  - Role of partnership in marketing plan
  - Content of a five year (or three year) plan
  - Positioning

Objectives

- With the 2000 Task Force, produce an evaluation summary of 1999 activities. As of June 1999, preliminary indications are that direct response marketing programs are generating exceptionally strong results.

- Oversee 2000 Task Force's development of 2000 plan and components:
  - Plan
  - Partnership opportunities
  - Presentation of 2000 plan

—— Committee Reports ——

Product Development Committee

Mandate

The mandate of the Product Development Committee is to review and provide recommendations to the Tourism Partnership Council and government on product development programming to ensure that programs are focused on enhancing the competitiveness and market readiness of Nova Scotia's key products, destinations and attractions. The committee will also direct its efforts at facilitating a supportive environment which encourages the development of high quality tourism products.

Members

- Co-chair Bill Hay, Mastodon Ridge
- Co-chair David Oxner, Tourism Nova Scotia
- Peggy Anderson, Kidston Landing
- Doug Fawthrop, White Point Beach Resort
- Lou Leith, Budget Car and Truck Rental
- Eric Mullen, Canadvac Travel Services Ltd.
- David Ross, Tourism Nova Scotia
- Peggy Tibbo-Cameron, Ex-officio, Secretariat

Resource support to the council committees is provided by the staff of Tourism Nova Scotia and the Nova Scotia Marketing Agency.

Meetings

The Product Development Committee has met six times since its inception in February 1999.

Achievements

- Tourism Product-Market Match Analysis: To make strategic decisions on the future direction of provincial product development initiatives, the Product Development Committee has initiated a major study to prioritize Nova Scotia's most competitive tourism products based on product and market readiness criteria. The study has been tendered and will commence in July, 1999.

- Facilitated discussions regarding proposed Tourism Accommodations Act definition changes that specifically create a new category of accommodations "Bed & Breakfast Inns". A sub-committee was formed by the Tourism Partnership Council in response to a request to them by operators in the tourism industry to provide an opinion to Tourism Nova Scotia.

Concerns/Challenges

- Numerous organizations are involved in some level of tourism development activities, including federal and provincial departments and agencies, municipalities, regional development authorities, regional and sectoral tourism associations, tourism businesses and community organizations.

- There is a need to facilitate discussion and communication among these organizations to ensure that efforts are better coordinated, and that scarce resources are maximized to develop the market readiness of Nova Scotia's most competitiveness tourism products.

Objectives

- Develop a provincial strategy that encourages and directs tourism development efforts and resources to priority tourism development opportunities. To achieve this objective, the committee will undertake the following activities during 1999/2000:

    - Tourism Development Review: A review will be completed documenting all organizations and their involvement in tourism development. This will assist the Product Development Committee in communicating and coordinating provincial product development activities.

    - Priority Tourism Products: Through research completed in the product / market match analysis, the Product Development Committee will formulate a prioritized inventory of Nova Scotia's most competitive tourism products based on product and market assessment. This information will help facilitate tourism development programming directed towards enhancing market readiness, and assist in development of the provincial marketing plan.

    - Improve the efficiency of tourism development activities by facilitating and encouraging communication among industry stakeholders.

- Assist with the communication and evaluation of tourism development initiatives being delivered through Tourism Nova Scotia. This includes evaluation of the pilot French readiness program "*Ici on parle francais*", a review of provincial interpretive literature, and communication of the five new "How To" tourism development publications in the areas of attraction development, marketing, retail, adventure tourism and community tourism planning.

—— Committee Reports ——

Vision Committee

Mandate

The Vision Committee incorporates both long-term strategic planning for the council, and marketing and product development planning for the tourism industry. This will involve working with and updating current strategic documents, most notably, the *Strategy for Tourism in Nova Scotia*. The work of this committee will largely involve collecting broad based stakeholder input, much of which will come through organizations such as the Tourism Industry Association of Nova Scotia, regional tourism associations and Voluntary Planning. It will also be looking to them for help in identifying issues, barriers and resources. Input will be compiled and analyzed, then utilized as a basis for continuous strategic planning.

There will be many opportunities for participation in the planning process through various input sessions which will be organized annually. The vision committee will manage the input processes; arrange think tanks with stakeholder organizations and engage debate on vision, issues and strategic direction. Of course, input will not be limited only to these organized sessions, as direct communication with the committee will always be encouraged.

Members

- Chair, Paul Stackhouse, Holiday Inn Harbourview
- Bruce Anderson, Bell Bay Golf Club
- Judith Cabrita, Tourism Industry Association of Nova Scotia
- Stephen Coyle, Tourism Nova Scotia
- Doug Fawthrop, White Point Beach Resort
- Robert MacDonald, Atlantic Canada Opportunities Agency
- Michele McKenzie, Nova Scotia Marketing Agency
- Eric Mullen, Canadvac Travel Services Ltd.
- David Oxner, Tourism Nova Scotia
- John Somers, Nova Scotia Marketing Agency
- Gordon Stewart, Voluntary Planning
- Karl Webb, Havenside Bed and Breakfast
- Peggy Tibbo-Cameron, Ex-officio, Secretariat

Resource support to the council committees is provided by the staff of Tourism Nova Scotia and the Nova Scotia Marketing Agency.

Meetings

The Vision Committee has held five meetings including the all day 'Think Tank' session with broader council and industry representative in attendance.

Achievements

- Facilitated development of council committees, structure and mandates.
- Expanded committee membership and developed a strategic planning process that will involve establishing benchmarks in a number of key result areas, then defining realistic and measurable goals (short, medium & long term) relative to each of the benchmarks. Once the goals are established a strategic plan can be developed.
- Convened a "Think Tank" involving the council and other industry visionaries to assist in the process of identifying what benchmarks would be needed.
- Identified five categories, namely Growth, Quality, Capacity, Marketing Efficiency and Business Environment. Indicators are now being defined before benchmarks can be established.
- Oversaw the development of terms of reference for a Business Case, the purpose of which is to clearly define the economic impact of the tourism industry within the Province. An independent consultant will be hired to conduct the study..

Concerns/Challenges

- Evolution of the council.
- Identification of significant projects/developments that will have significant impact on the tourism industry.

Objectives

- Establish benchmarks by Fall of 1999, which can be used in conjunction with Year 2000 Marketing Plan.
- Develop strategic plan by May 2000.
- Seek industry input and consultation.

—— Appendix A ——

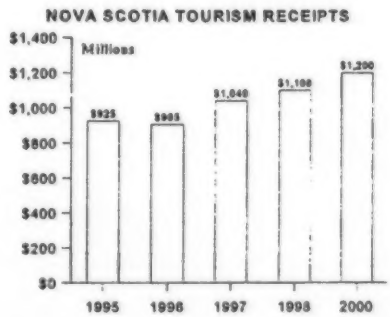
1998 Tourism Industry Performance Highlights

Nova Scotia tourism is big business and the province is well poised to capitalize on the growing travel market. In all, the $1.1 billion industry supports jobs for some 33,800 Nova Scotians with a payroll of about $430 million dollars. These jobs are filled by people in every village, town and city across this province. And the opportunities enable community economic development to thrive.

Tourism is also a significant export industry, with more than half of this billion-dollar revenue coming from outside the province. That's new money moving in Nova Scotia's economy. All Nova Scotians also share in the benefits of a booming tourism industry, with last year's revenue adding up to $105 million in provincial and municipal taxes.

How important is tourism?

In 1998, tourism was a $1.1 billion industry. Tens of thousands of Nova Scotian jobs depend on tourism activity, and it is expected to only get better. The province's tourism industry revenues increased 6% in 1998. It is now anticipated that tourism revenues in Nova Scotia will reach $1.2 billion by 2000. In 1998, the tourism industry in Nova Scotia generated:



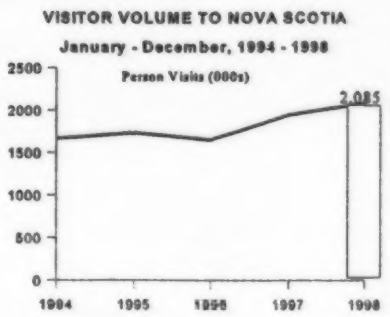
- $1.1 billion in direct revenues
- 33,000 direct and indirect jobs
- $430 million in direct and indirect wages and salaries
- $106 million in provincial and municipal taxes

What businesses benefit from tourism?

Spending by tourists in Nova Scotia benefits almost all sectors of the Nova Scotia economy. Since this spending generates tax revenues for the municipal and provincial governments, it also helps to support and maintain our essential services like health care, education, police services and snow removal.

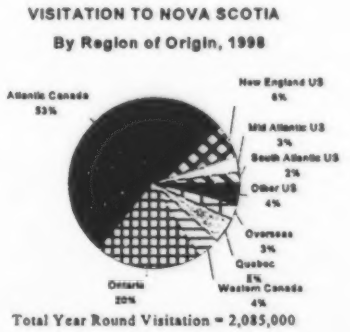
How many people choose Nova Scotia as a travel destination?

For January to the end of December 1998, total overnight, non-resident, visitation to Nova Scotia climbed to 2.085 million people. In addition to visitors from outside the province, Nova Scotians make about four million trips within the province annually, providing significant benefits for the industry.

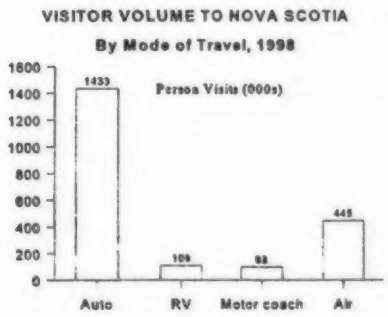


Who visits Nova Scotia?

The majority of non-resident visitors to Nova Scotia come from other areas of Atlantic Canada (53%). Visitors from Ontario comprise another 20%, while other parts of Canada, the US and overseas visitors also make a significant contribution to non-resident visitation. In 1998, 317,000 visitors came from the United States, while 52,000 came from other international markets.



Total Year Round Visitation = 2,085,000

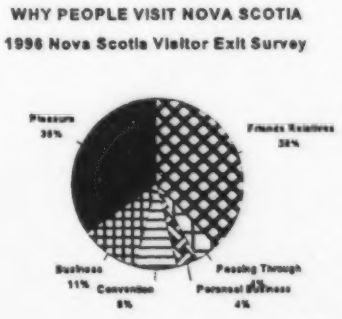


How do visitors travel?

As in the past, most visitors to Nova Scotia travel by car (69%). Airplane (21%), recreational vehicle (5%) and motor coach (5%) account for the remainder. Visitation increased for all four modes of travel.

What attracts people to Nova Scotia?

People visit Nova Scotia for many reasons: to take a vacation and enjoy the natural beauty that Nova Scotia offers, to visit friends and relatives, to conduct business, attend conventions, and to take care of personal business.



—— Appendix B ——

Nova Scotia Marketing Agency

Administration

Michele McKenzie	Executive Director
Dianne Kean	Secretary

Regional Marketing

Pat Lynch	Manager
Carol Longard	Secretary
Nancy MacIsaac	Senior Marketing Officer
Michele Bourgeois	Marketing Officer
Joanne Hagen	Marketing Assistant

Trade Promotions

Rick Young	Manager

Sales Market Development

Minto Stewart	Director, Market Development
Marilyn Meade	Secretary (casual)
Kim Jardine	Sales Manager
Ron Comeau	Marketing Consultant
Cindy Wade	Market Consultant (Acting)
Cathy Kalil	Coordinator for the Millennium Secretariat

Creative Services

Marsha Andrews	Manager of Creative Services
Michelle Paradis	Secretary (Casual)
Colleen Abdullah	Print/Production/Design Supervisor
Mary Lou Landry	Graphic Artist
Randy Brooks	Program Administration Officer
Linda Murphy	Public Information Officer
Fabian Joseph	Marketing Assistant
Wally Hayes	Photographer
Lori Blackburn	Co-op Student
Lisa Collie	Co-op Student
Nicole Laybolt	Co-op Student

Strategic Target Marketing

John Somers	Manager, Planning and Research
David Jones	Evaluative Research Officer
Vicki Siscoe	Direct & On-line(WEB) Marketing Officer
Connie Chen	Clerk (Casual)

Tourism Nova Scotia

Administration

David Oxner	Executive Director
Irene Crocker	Administrative Assistant
David MacKay	Manager, Accounting

Quality Services and Signature Resorts (Head Office)

Doug Matthews	Director, Quality Services & Signature Resorts
Glenna Parsons	Secretary
Lyn Miles	Quality Services Officer
Susan Jefferies	Sales Manager
Kendra Decoste (Casual)	Quality Services Officer
Sheila Deveaux (Casual)	Quality Services Officer
Ronald van der Wegeen	Canada Select
Maria Wong	Canada Select
Tracy Spracklin	Co-op Student

Tourism Development

Kim McNutt	Manager
David Ross	Acting Manager
Jennifer Halliwell	Administrative Assistant
Bob Book	Tourism Development Officer
Jennifer MacIntyre	Tourism Development Assistant
Darlene MacDonald	Tourism Development Officer
Bill English	Tourism Development Officer-Cape Breton
Erin Moore	Tourism Development Assistant
Angela Decker	Co-op Student

Enquiries and Research

Robert Boyd	Manager of Enquiries and Research
Karen McNutt	Research Analyst
Donna Harrity-Moir	Tourism Research Enquiries
Stephen Coyle	Senior Research Analyst
Jim Falconer	Data Entry Clerk
Steven Hayes	Audio Visual Technician
Kevin Wambolt	Research Assistant
Brian Marriott	Distribution Supervisor
Sadie Thomas-Frye	Supervisor, Portland IVIC

Visitor Information Services

Sharon Martin	Manager of Visitor Information Services
Cary Murray	Retail Sales Coordinator
Jackie Kelly	Secretary (Casual)
Lisa MacIsaac	Visitor Information Officer
Heather Sancton	Field Services

Airport Terminal Visitor Information Centre

Terrilynn Andrew	Manager
Odette Jackson	Senior Travel Counsellor
Therese James	Senior Travel Counsellor
Janette Wallace	Senior Travel Counsellor
Tania Sampson	Travel Counsellor (casual)

Halifax Downtown (The Red Store)

Allan Doyle	Senior Travel Counsellor
Dave MacDonald	Travel Counsellor (casual)

International Visitor Centre

Terrilynn Andrew	Supervisor
Bruce Sutherland	Senior Travel Counsellor

Tourism Nova Scotia (con't)

Nova Scotia Signature Resorts

The Pines
Rene LeBlanc General Manager

Keltic Lodge
Ian Green General Manager

Liscombe Lodge
Rick Draper General Manager

Notes

NOVA SCOTIA
Tourism Partnership
COUNCIL

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